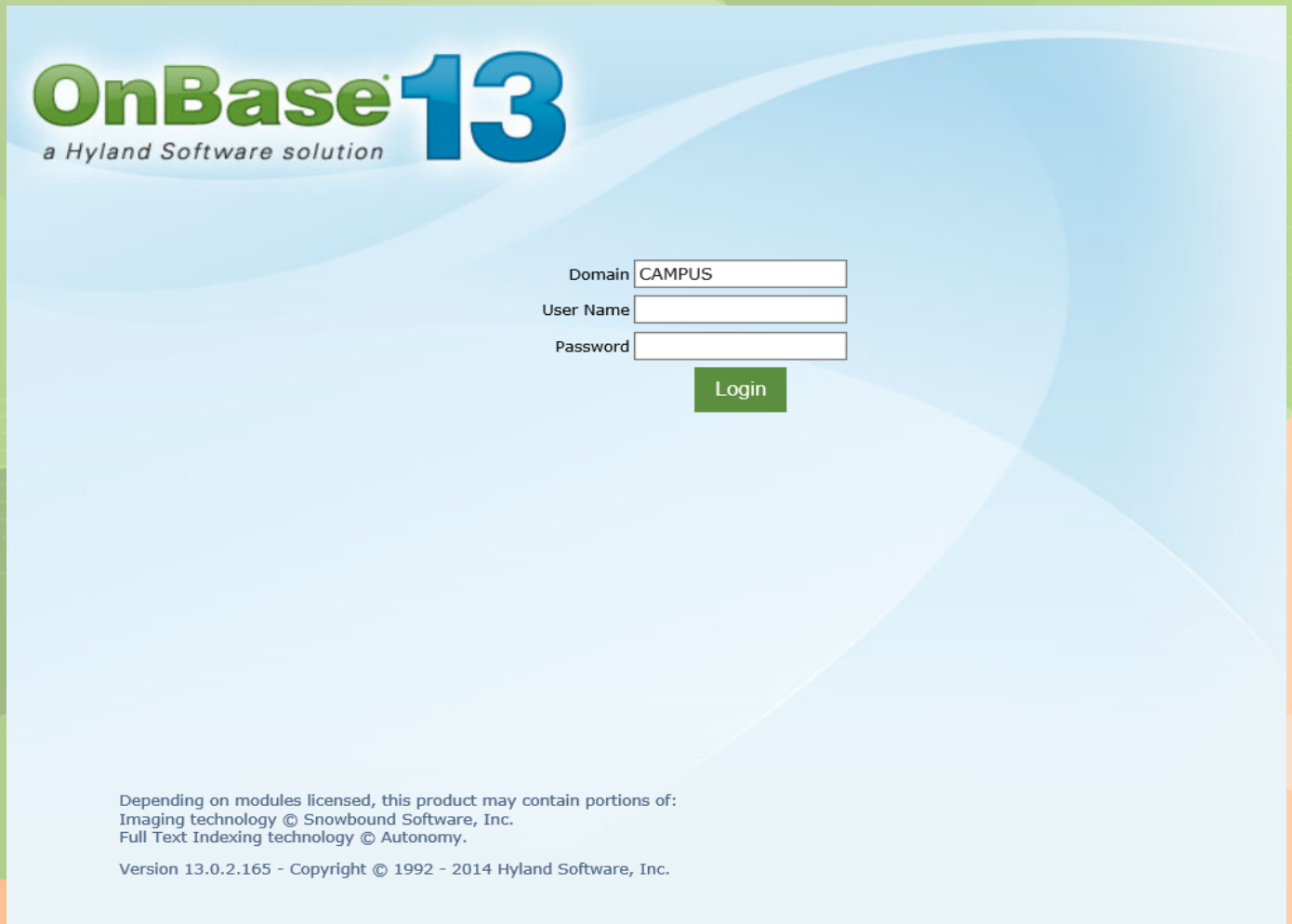
ONBASE TRAINING

What is OnBase : Create, Manage and Retrieve

- Document management system
- Store documents securely and electronically in a central location
- User friendly interface that allows easy retrieval of documents
- Documents can be viewed, printed, emailed, and have notes added to them
- Workflow module for departments that want to use OnBase to process documents

Login


OnBase 13
a Hyland Software solution
Domain
CAMPUS
User Name
Password
Login
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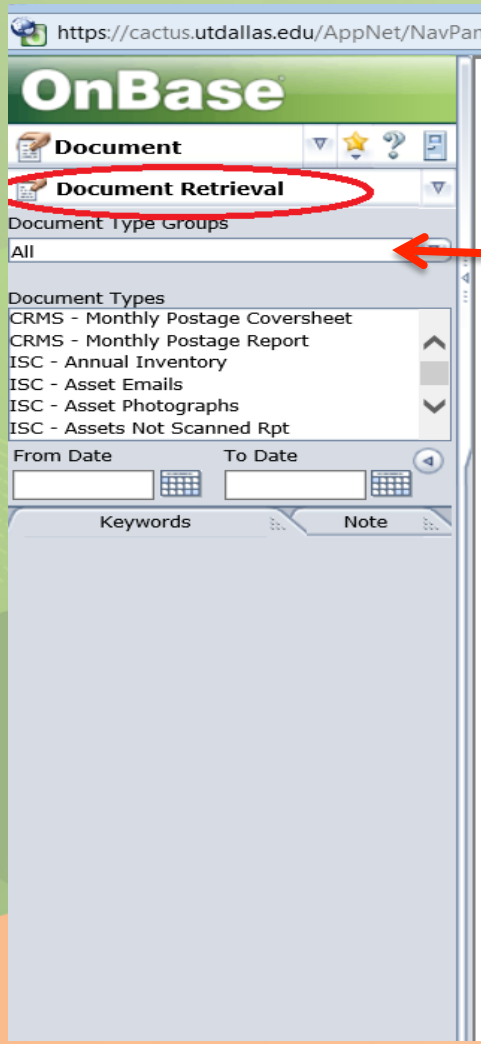
Document Retrieval Dialog Window Layout

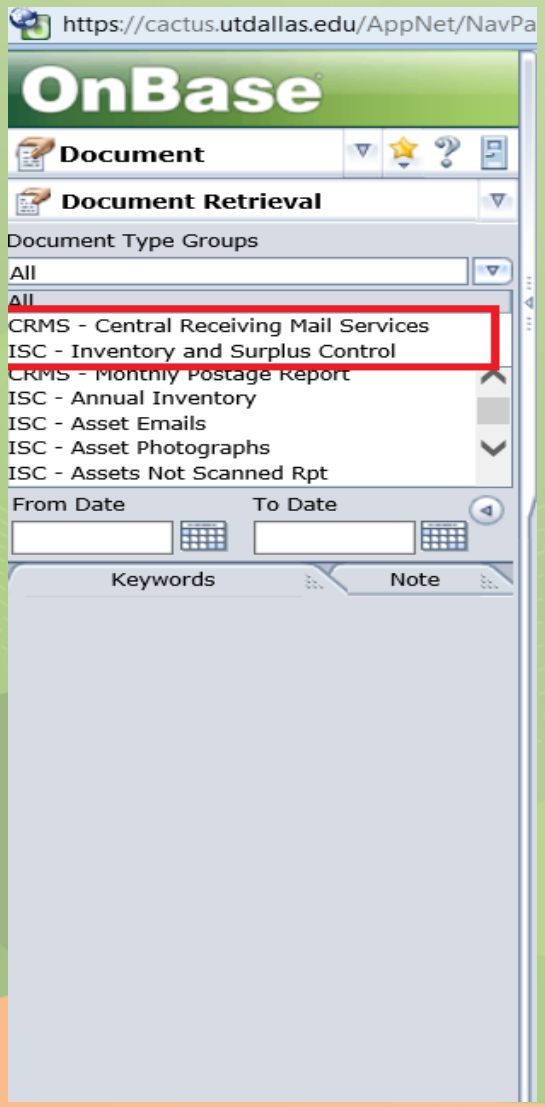
- Document Type Groups
- Document Types
- Dates
- Keyword

OnBase Document Retrieval

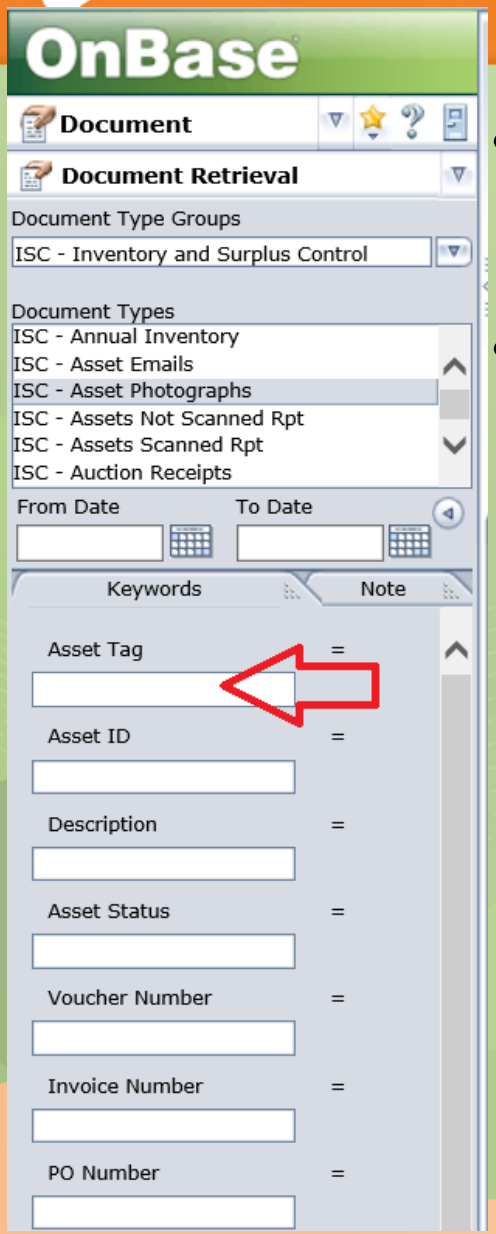


1. **Document Type Groups:**

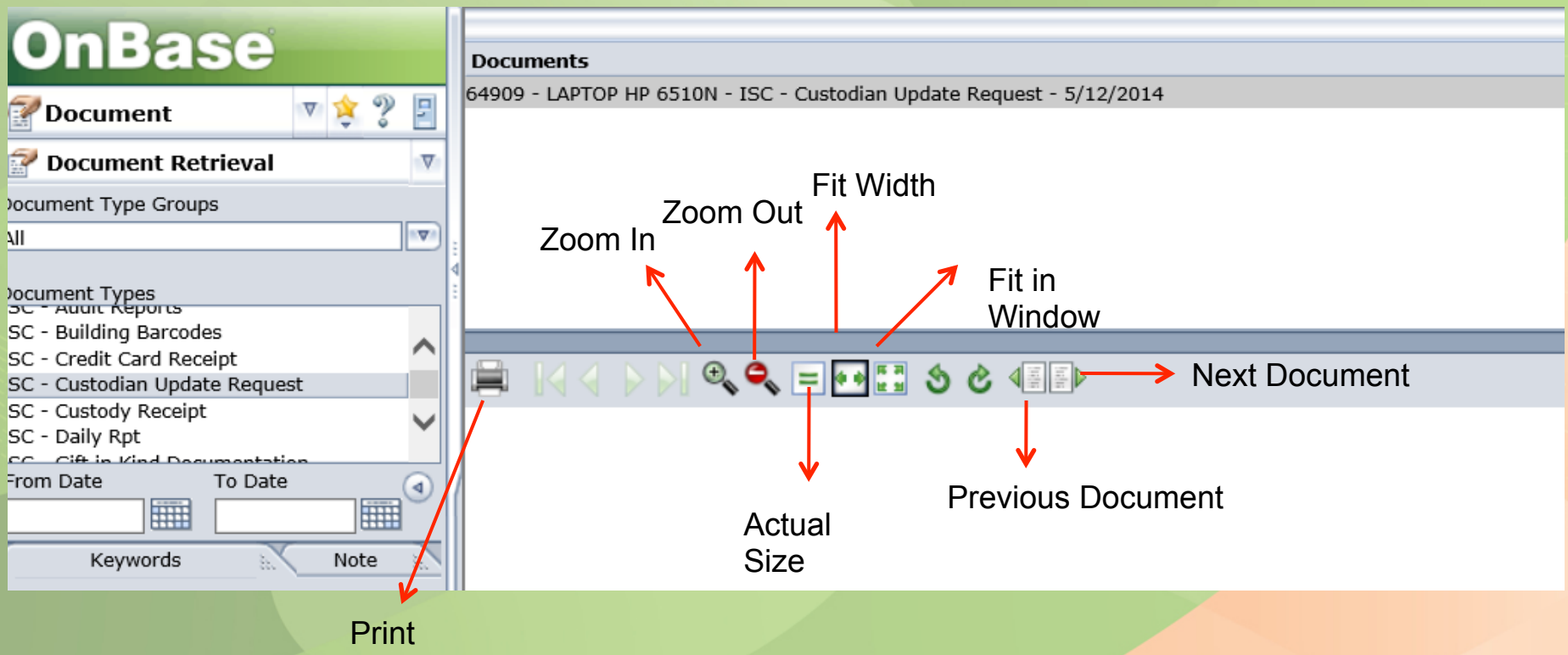
- Document type groups are groups defined by our organization
- A group is a general heading for specific types of documents
- Ex. Inventory and Surplus control



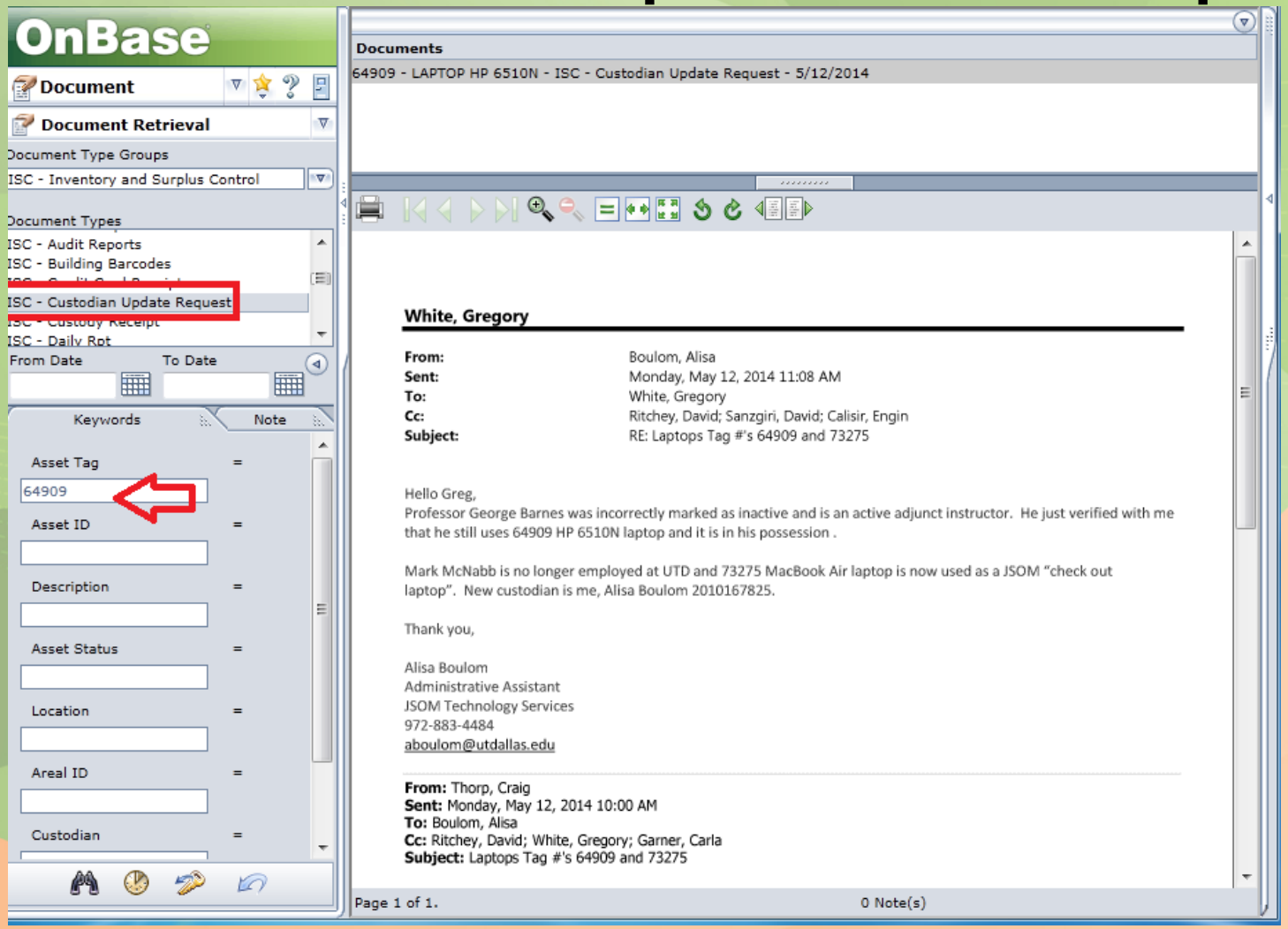
- There are two document type groups:
  - Central Receiving Mail Services (CRMS)
  - Inventory and Surplus Control (ISC)



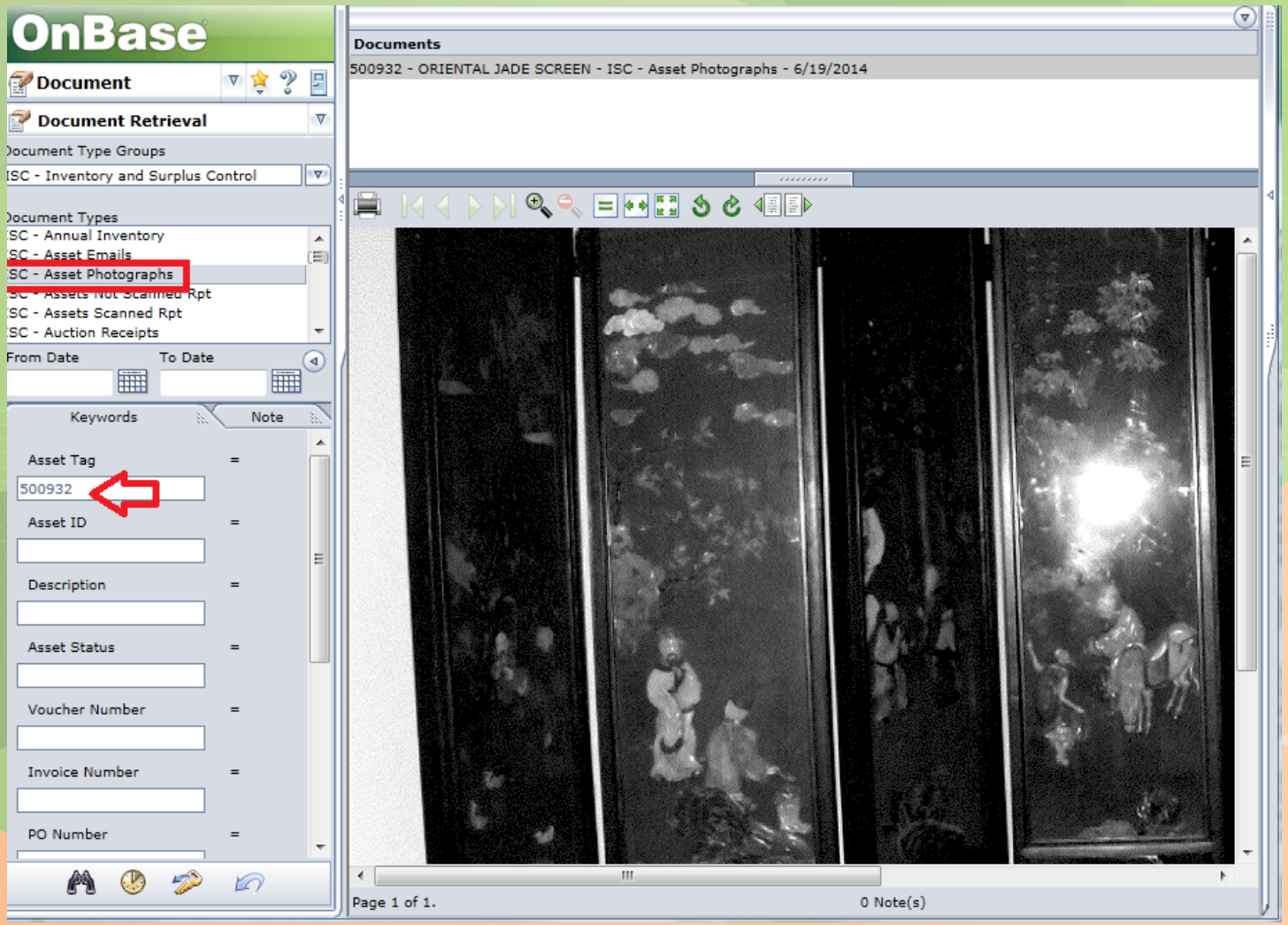
- Anything that has a **tag number**, you can find it on OnBase.
- Assets can be looked in the following categories ;
  - asset emails
  - photographs
  - credit card receipts
  - custodian update request
  - custody receipts
  - gift in kind documentation
  - MISC (miscellaneous)
  - missing stolen report
  - property master record
  - state transfer
  - transfer forms
  - vehicle titles


OnBase
Document
Document Retrieval
Document Type Groups
All
Document Types
SC - Building Barcodes
SC - Credit Card Receipt
SC - Custodian Update Request
SC - Custody Receipt
SC - Daily Rpt
From Date
To Date
Keywords
Note
Documents
64909 - LAPTOP HP 6510N - ISC - Custodian Update Request - 5/12/2014
Zoom In
Zoom Out
Fit Width
Fit in Window
Next Document
Previous Document
Actual Size
Print

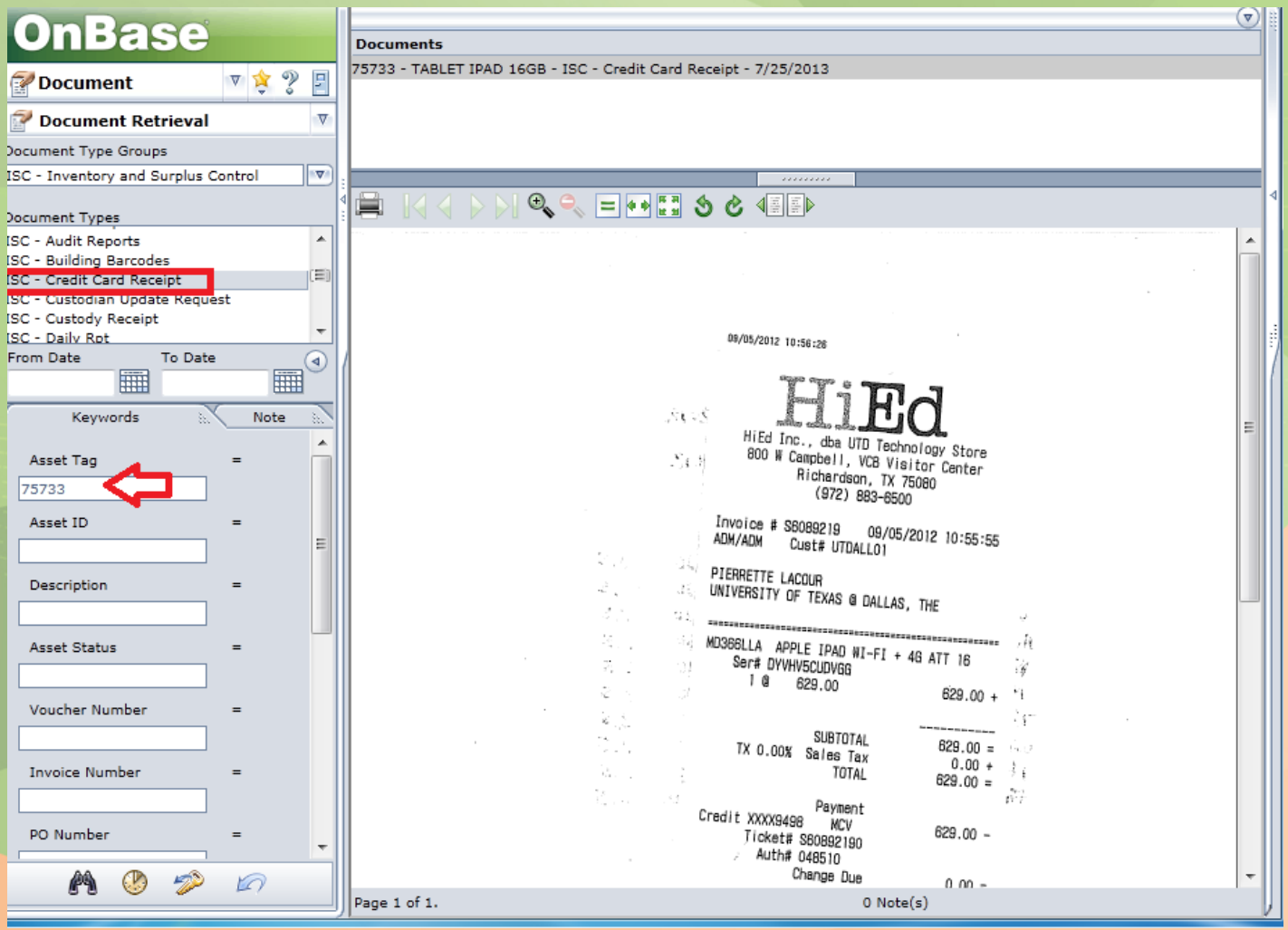
Custodian Update Receipt



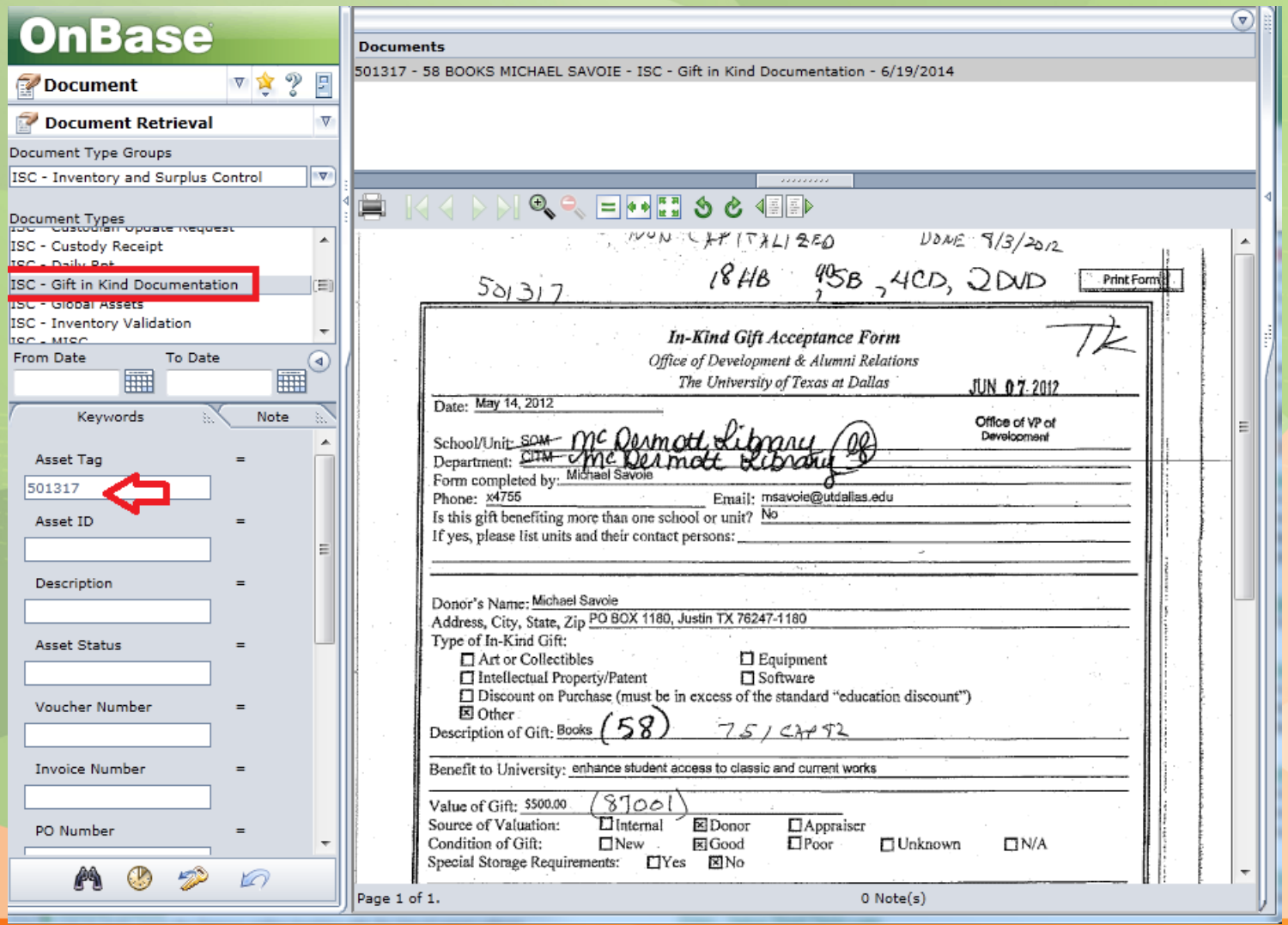
Asset Photographs



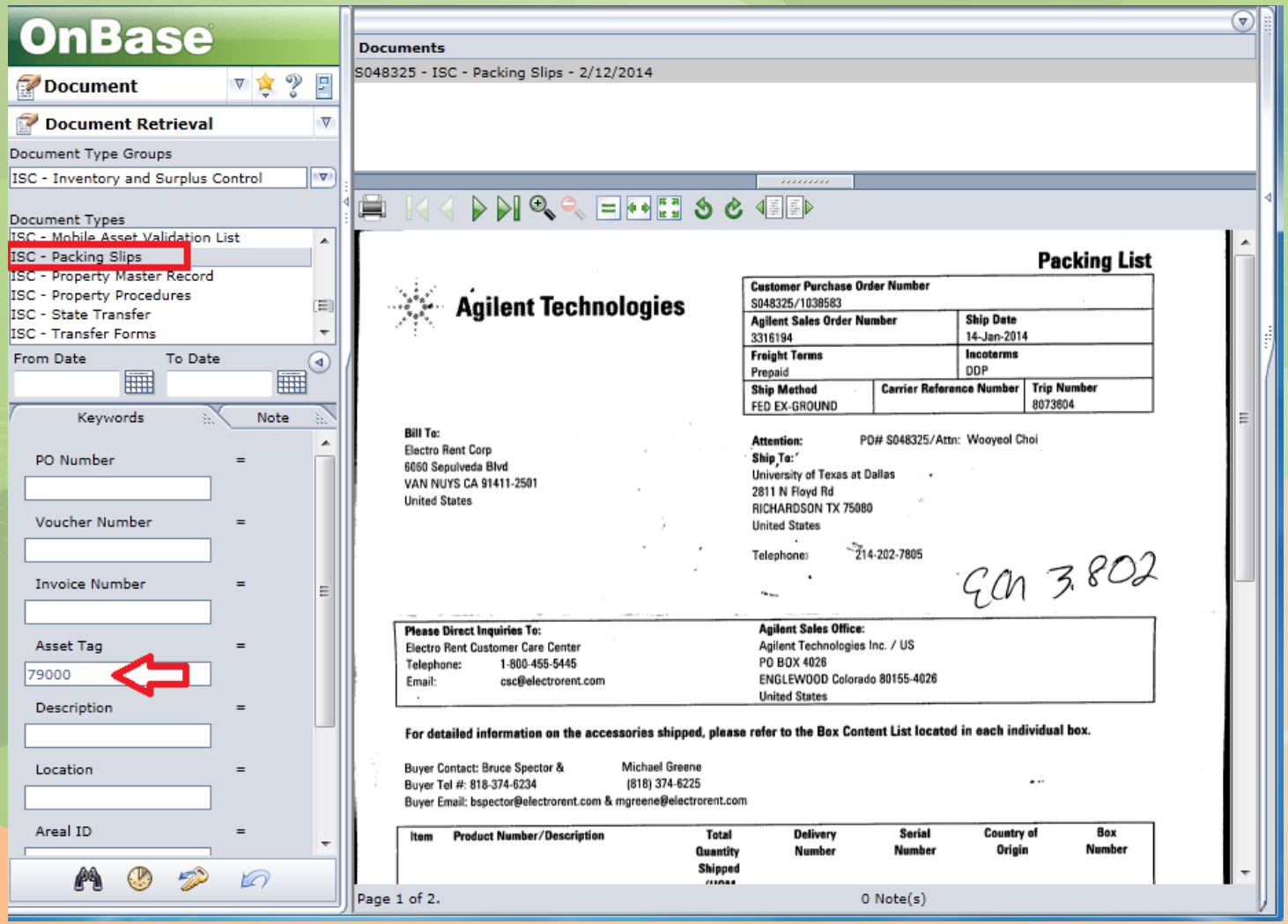
Credit Card Receipt



Gift in Kind Documentation



Packing Slips



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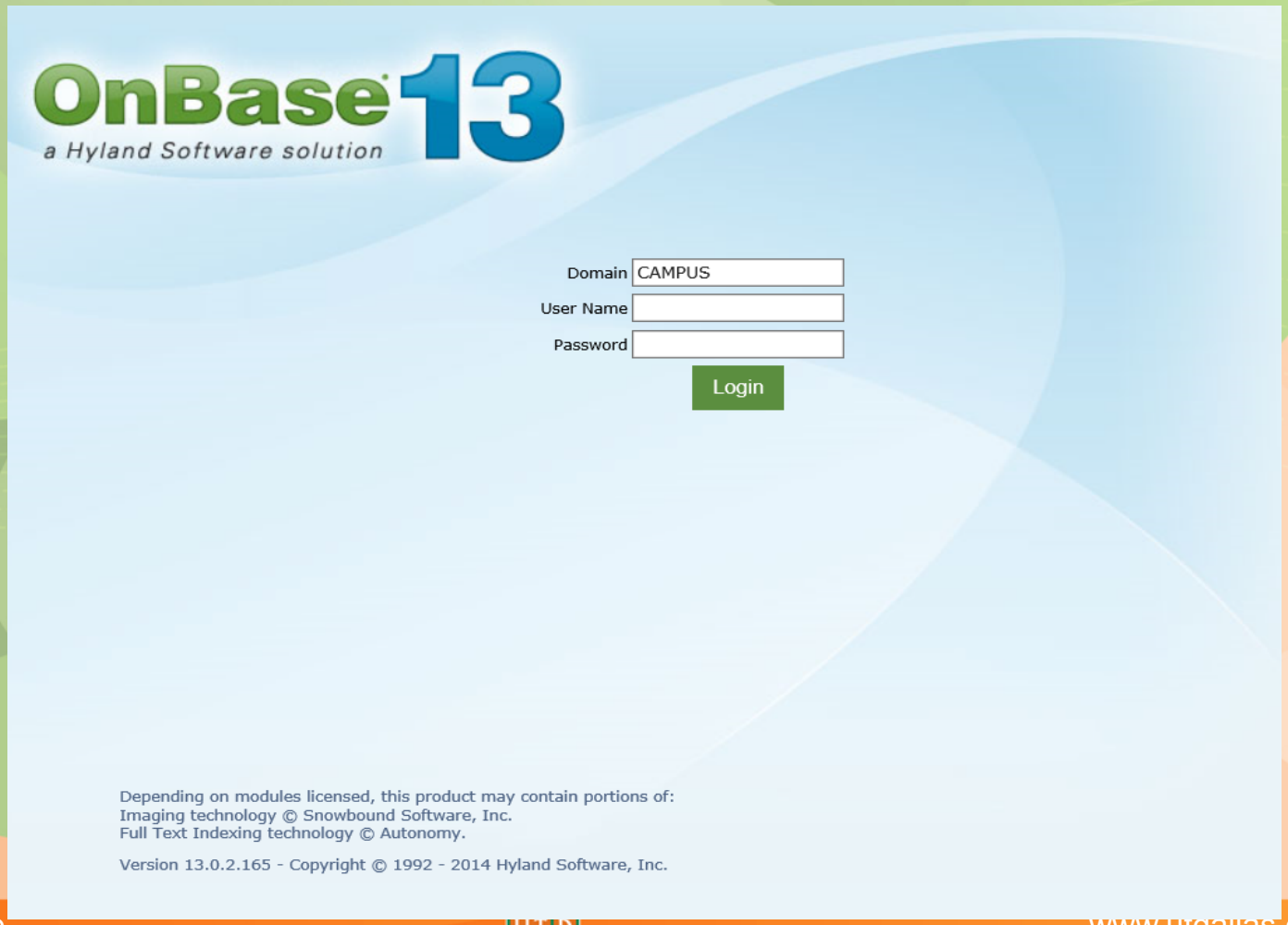
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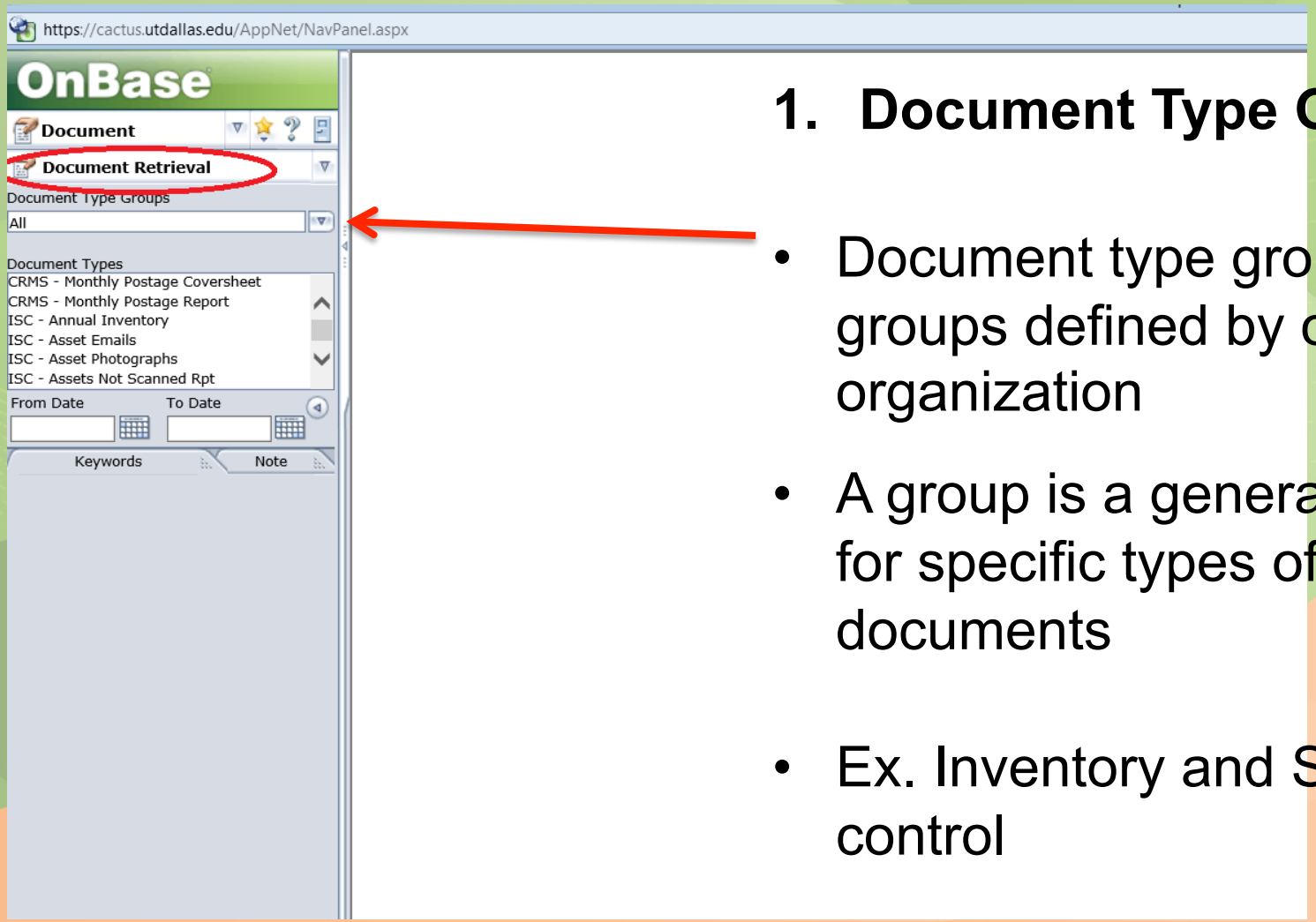

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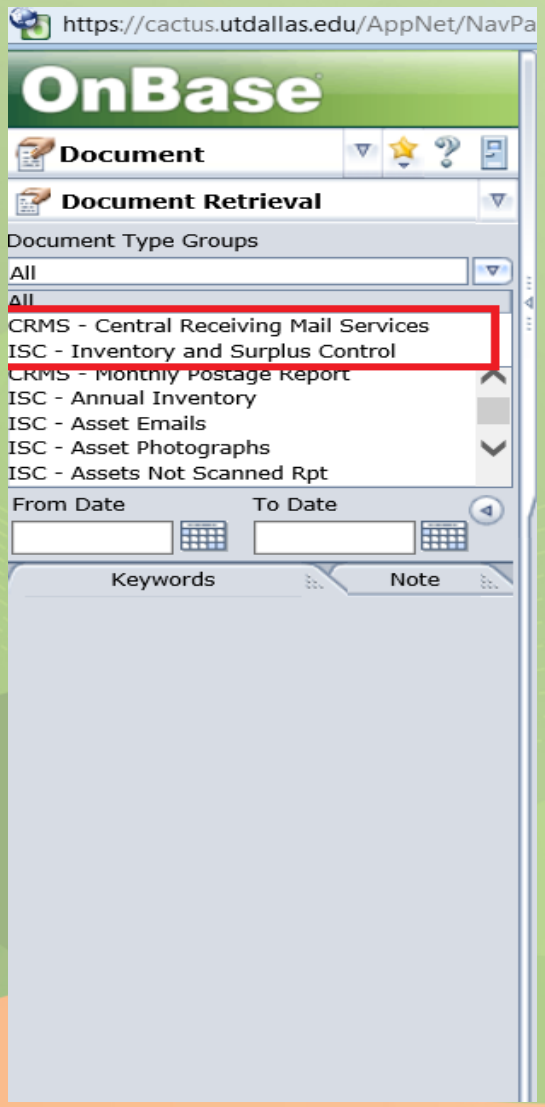

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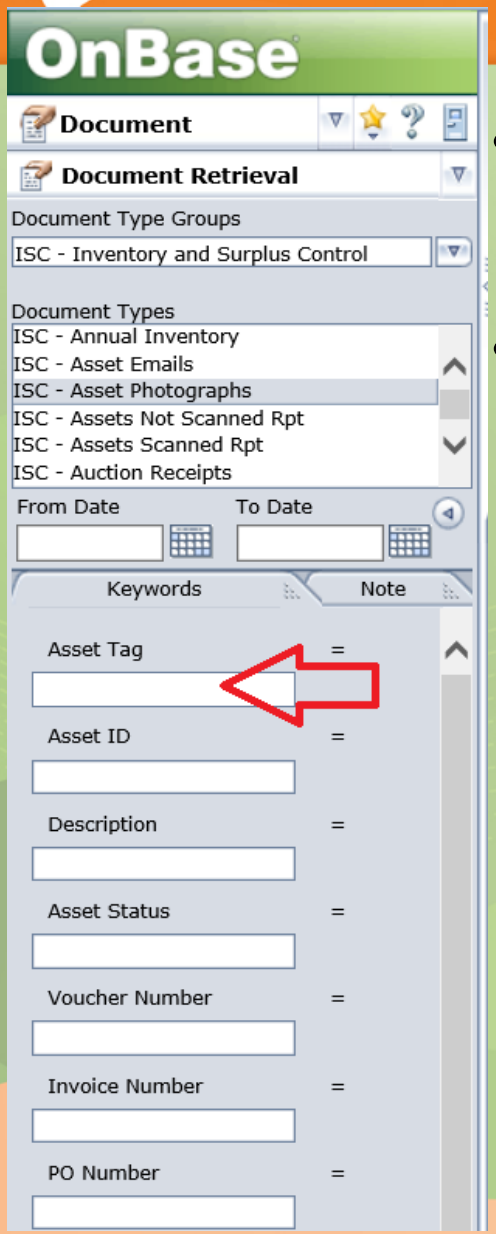

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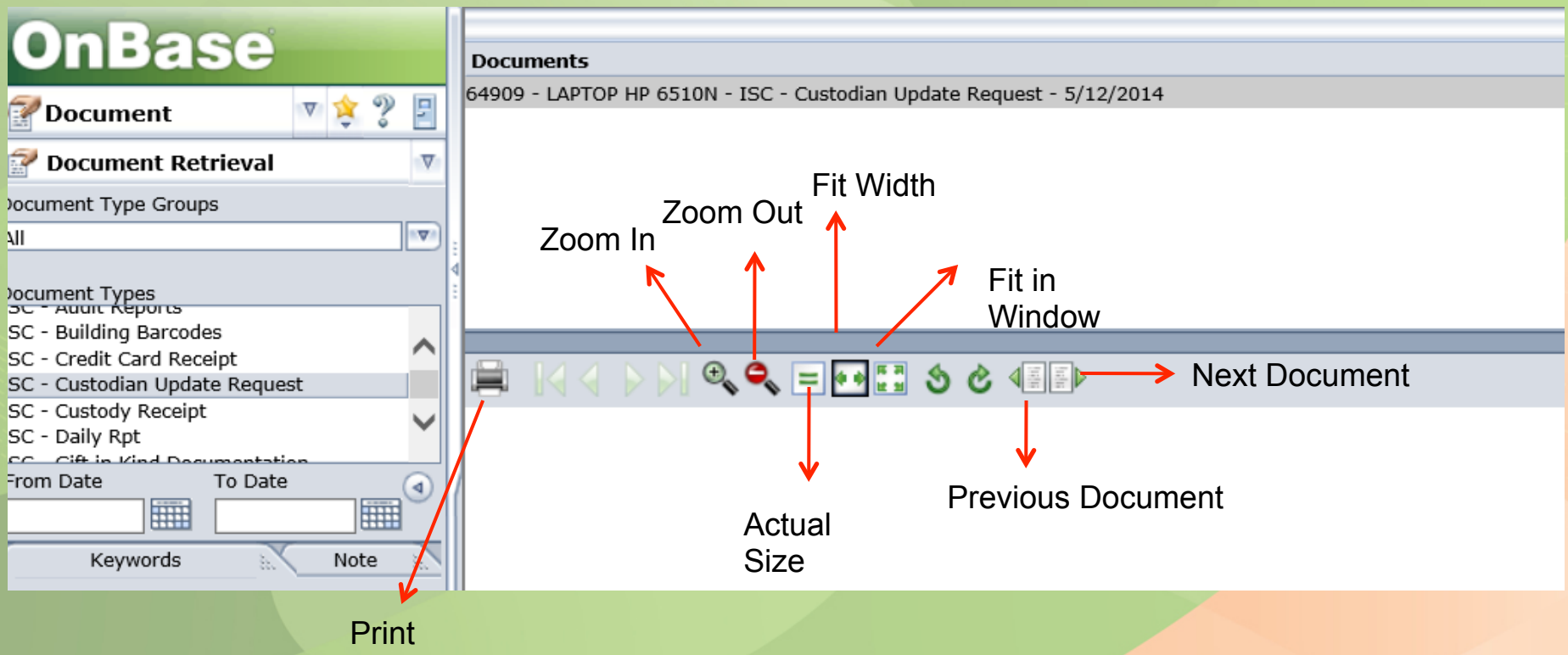
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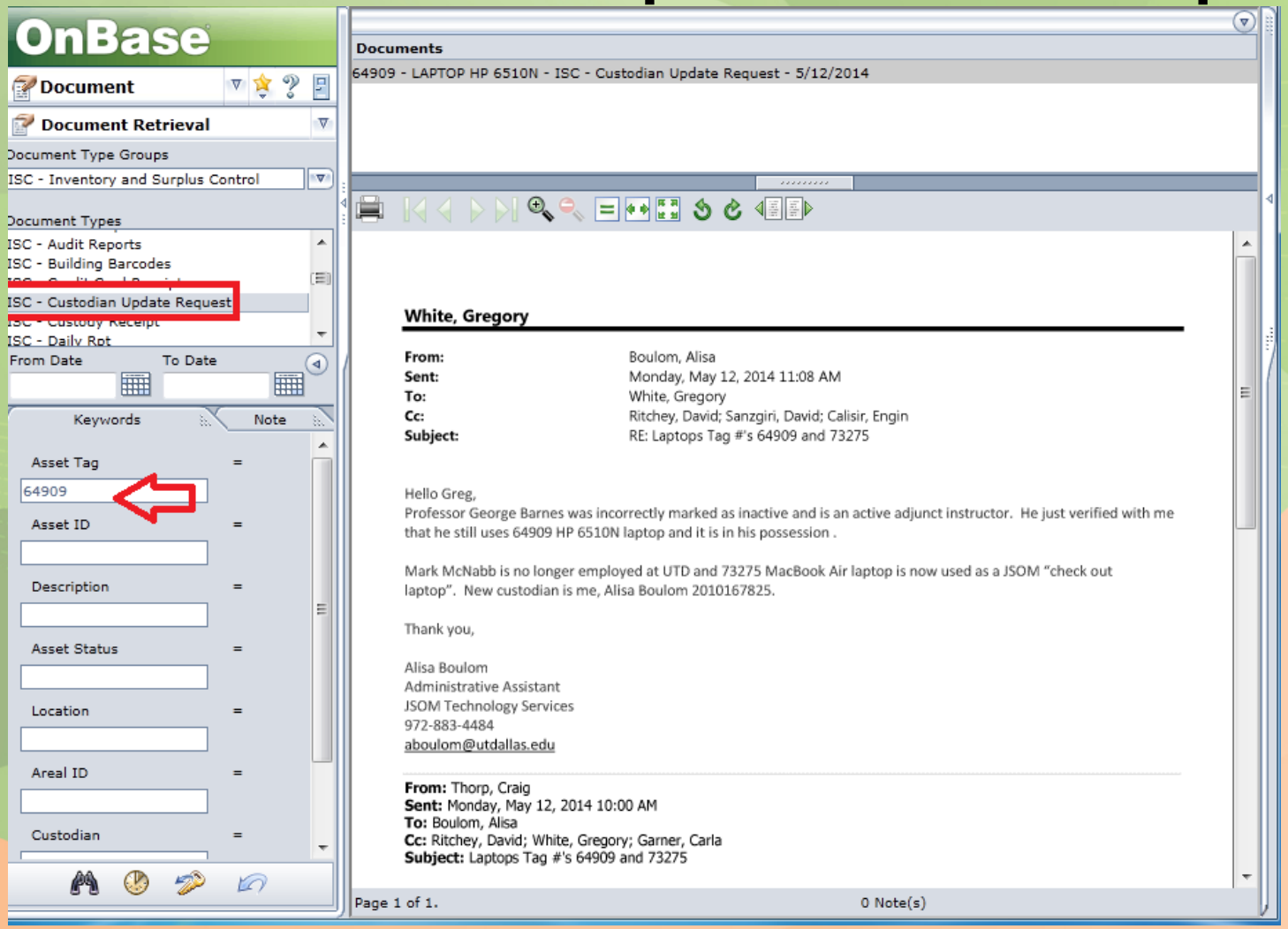
Custodian Update Receipt



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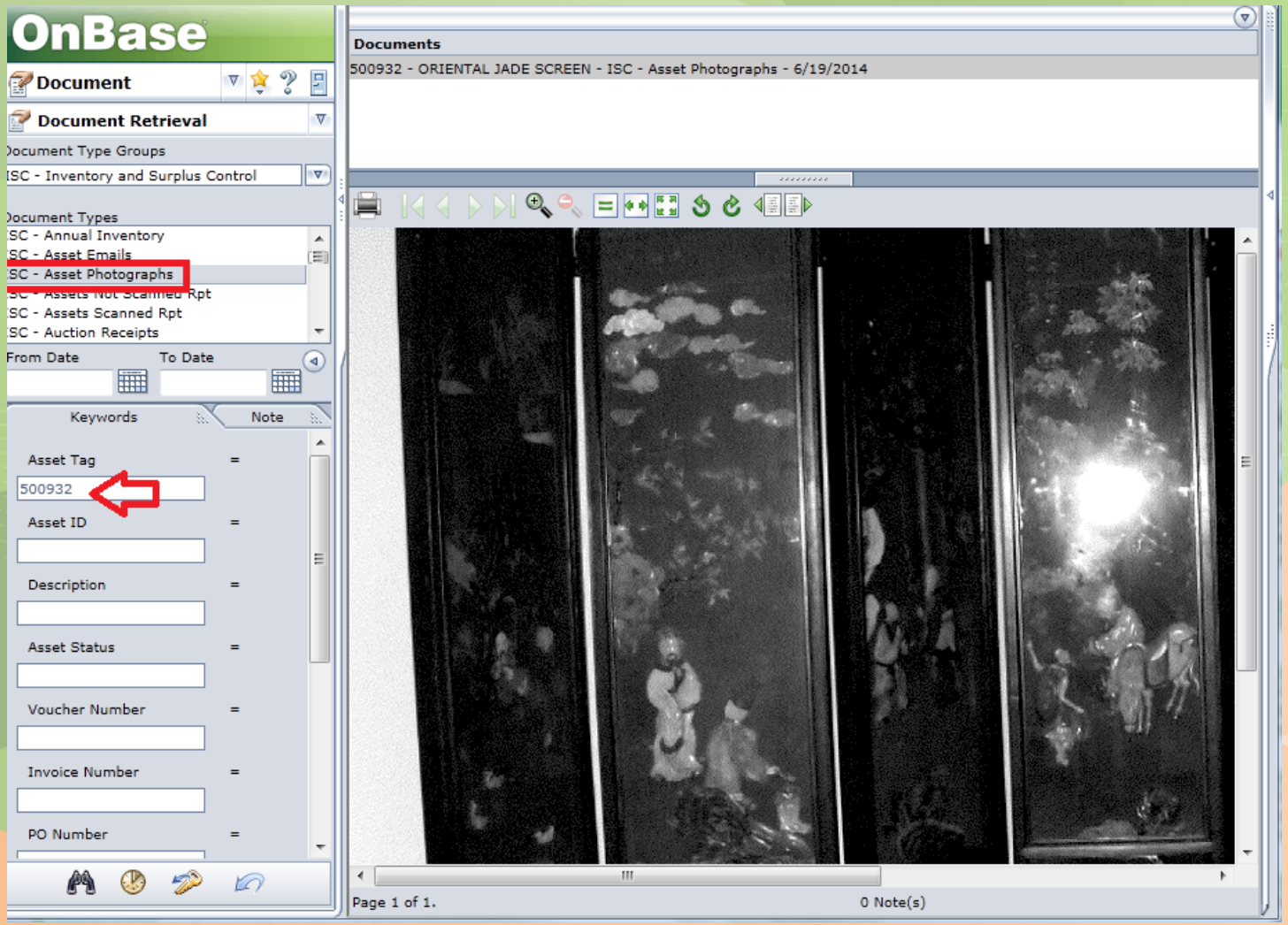

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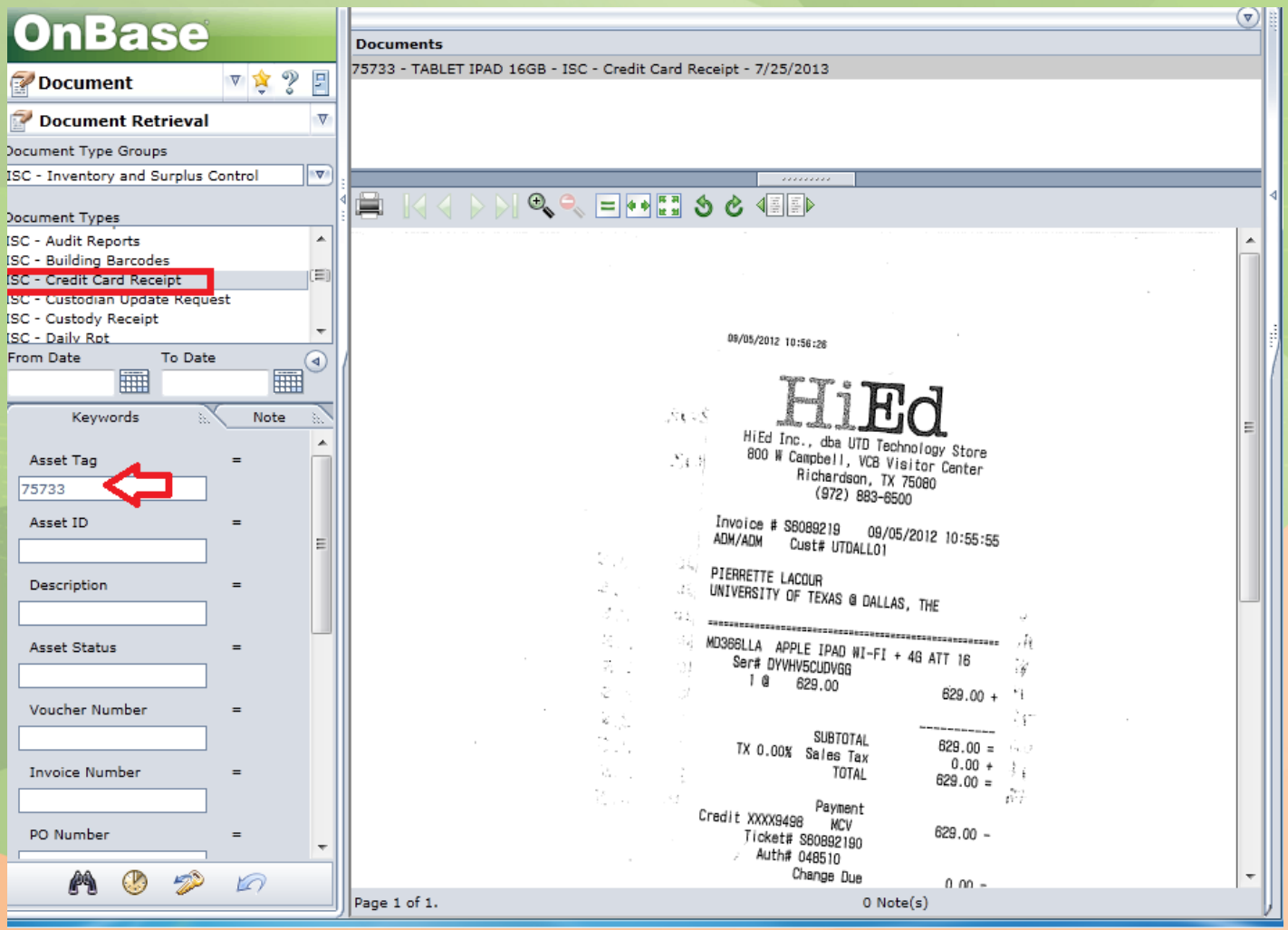

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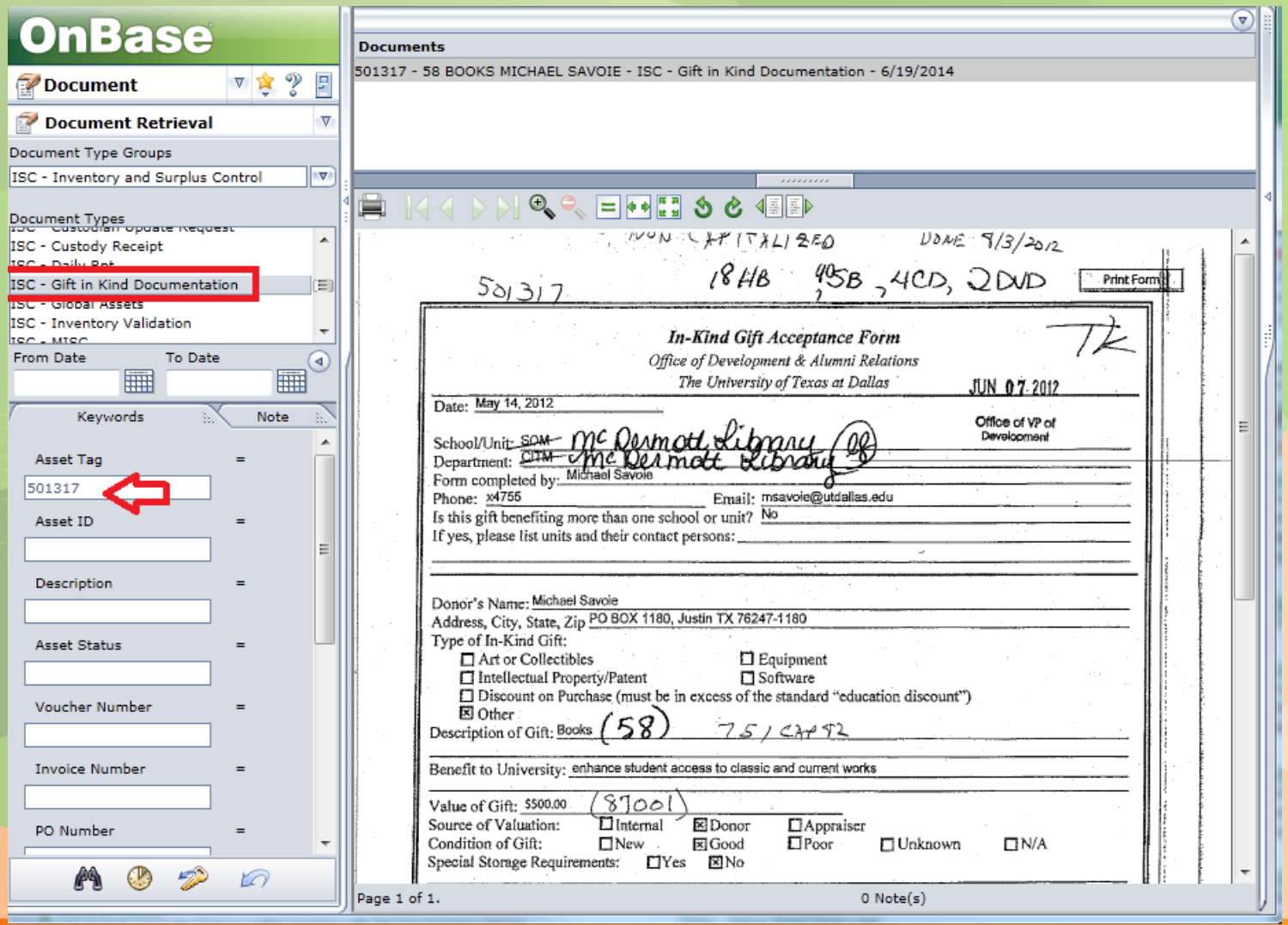
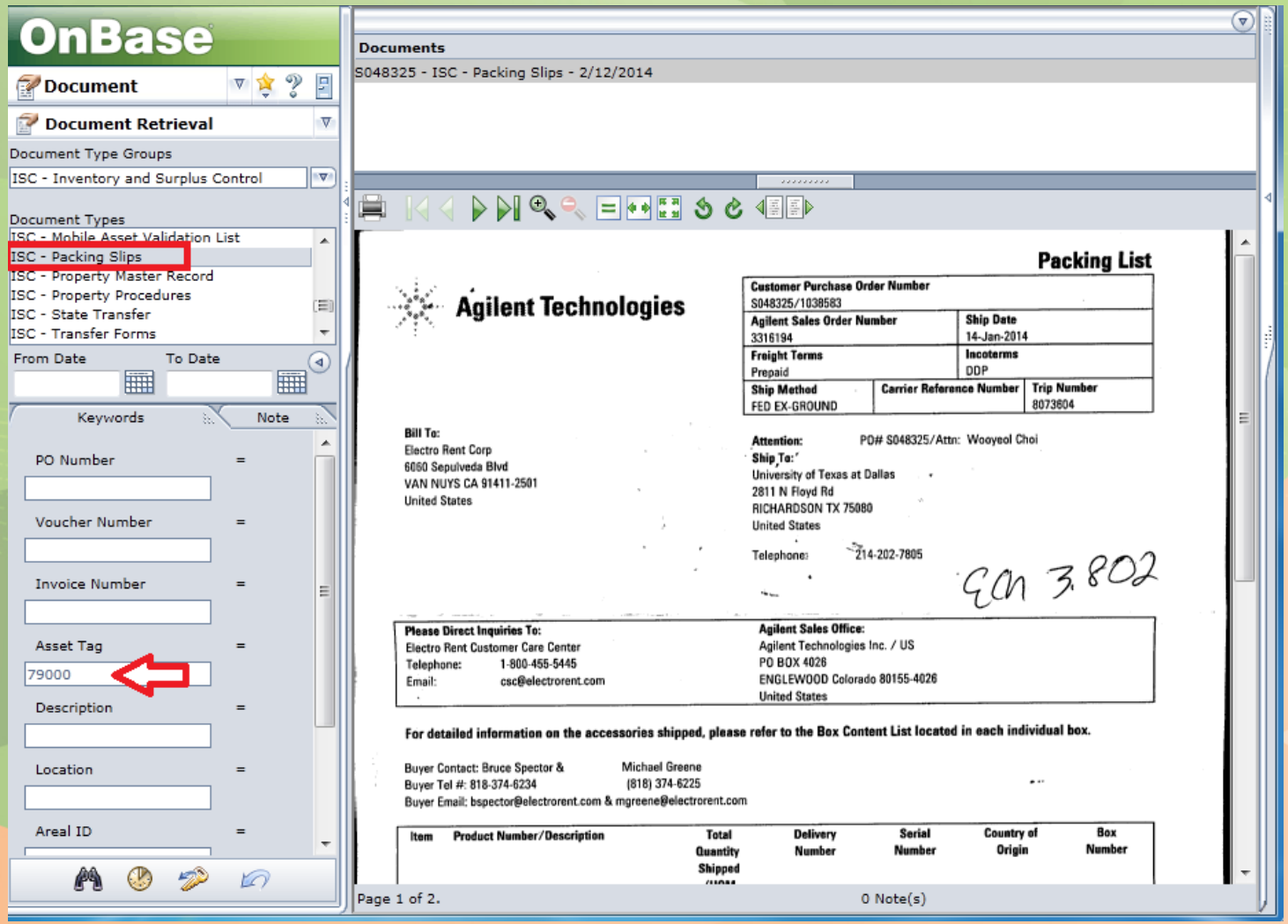
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